

COOPERATIVE FORECASTING GROUP

December 21, 2022

Hybrid Meeting

10:04 A.M. to 11:33 A.M.

MINUTES

Mr. Jeff Bronow, Howard County, called the meeting to order at 10:04 A.M.

1. APPROVAL OF MINUTES

Ms. Kathleen Comber, Carroll County, moved to approve the minutes from the October meeting of the Cooperative Forecasting Group (CFG), with Ms. Deborah Price, Harford County, seconding the motion. The minutes were unanimously approved.

2. TECHNICAL ASSISTANCE – FUTURE TRENDS UPWP TASK

At the October 26 meeting of the CFG, membership discussed their interest in proposing the addition of a consultant task to the UPWP for fiscal year 2024. Based upon the comments received on this topic from the October meeting, Mr. Shawn Kimberly, BMC, wrote and distributed a draft UPWP task description to CFG membership for their consideration. The draft description served as the basis of a group discussion to confirm the areas of emphasis for the task and to wrap up the text for the consideration of the Technical Committee (TC) and Baltimore Regional Transportation Board (BRTB).

As planners involved in the development of local estimates and forecasts for population, household, and employment growth, the CFG membership would like to learn more about how the COVID-19 pandemic and related public health measures caused or accelerated shifts in how and where people work, with direct impacts on the region's population and economy. The pandemic sparked a large-scale work from home experiment that caused many to reconsider their home and work location preferences. It expedited changes in commercial real estate markets and in commuting patterns. The proposed task calls for analysis of these trends and a quantifying of the potential long-term implications, thereby informing land use assumptions for future forecast rounds and travel demand modeling efforts.

Mr. Kimberly sought comment from the group on the draft, and recorded proposed edits from membership. Suggested additional content included exploring how the expansion of the work-

from-home work arrangement might affect housing type preferences, the structure of the “typical” workweek (days of the week and hours), and expand labor force participation rates for disabled persons. Another recommendation was to quantify how the growth of same day delivery in the retail sector is affecting demand upon the region’s road networks.

Mr. Kimberly provided the group with some additional background information on the selection process for consultant tasks, noted that there were 11 proposed projects seeking approval, and highlighted the timing of the FY 2024 UPWP schedule. The timing is as follows:

- Late 2022 – Discussion of Potential Topics by TC/BRTB
- February 7 – Present Draft FY 2024 UPWP to Technical Committee
- February 8 – Release draft for 30-day public comment
- March 9 – Deadline for Public Comments
- April 4 – Present FY 2024 to TC for recommendation for approval
- April 21 – Approval at Elected Officials Meeting of BRTB
- April 26 – Submit to FHWA/FTA/EPA
- May – BMC prepares contracts for local signatures
- July 1, 2023 – Begin FY 2024

Mr. Kimberly requested that any additional suggestions or comments be sent to him as soon as possible, so that they can be included in TC/BRTB UPWP discussions.

3. COUNTY LEVEL EMPLOYMENT BY INDUSTRY PROJECTIONS – MARYLAND DEPARTMENT OF PLANNING

Mr. Al Sundara, Maryland Department of Planning (MDP), presented on the agency’s county level employment projections by industry sector. He explained that MDP’s State Data Center produces a series of projections including total population, household population, number of households, average household size, labor force, school enrollment, total employment, employment by industry, personal income, and per capita personal income.

The employment projections include total jobs by place of work by jurisdiction and total jobs by place of work by industry. Source data for the employment projections include the Bureau of Economic Analysis total jobs data, Maryland Department of Labor short-term projections (for populations of 100,000 or more), and the U.S. Bureau of Labor Statistics projections of employment by industry sector for the nation. Additionally, jurisdictional and regional projections developed by this Cooperative Forecasting Group and that of the Metropolitan Washington Council of Governments (MWCOCG) are considered.

Mr. Sundara described their process of developing employment projections, noting that historical trend data is utilized to develop regression equations to determine growth rates for application to current jurisdiction level estimates. The resulting employment projections are compared with separately calculated projections for the labor force, to serve as a check (to see if enough workers are available to support projected job growth). For BMC and MWCOCG

jurisdictions, projections are also checked against each region's forecast data. For rural jurisdictions, the projections are checked against the data previously collected by MDP.

MDP produces a historical series of employment data from BEA. Differing from the CFG, MDP utilizes the BEA total jobs figures, without adjusting for proprietors. In order to avoid the disclosure of confidential information, the BEA may not report employment totals for each industry in all jurisdictions. In these cases, a computer model (utilizing the Fratar procedure) is utilized to estimate the missing information.

When developing projections for total jobs by place of work by industry, MDP starts with the jurisdiction level projections created with the regression technique. Staff then references the Maryland Department of Labor's employment projections by industry to inform industry level growth rates. These rates are not necessarily applied uniformly, and may be adjusted based upon recent trends. MDP also checks the industry growth rates used in their projection efforts against BLS projections of employment by industry sector at the national level. This provides for a good check on which industries are experiencing growth and which industries are in decline.

Mr. Sundara said that MDP anticipates the finalized versions of the projections to be on their website by early February 2023.

[PowerPoint: Maryland Department of Planning, Projections Methodology, Employment]

4. DEVELOPMENT MONITORING – RESIDENTIAL HOT SPOT REPORT

Ms. Crystal McDermott, BMC, reported on the region's housing growth in 2021, noting that the number of permitted new residential units in the year reached 7,864 (an increase of 2.3% over the 2020 figure). She added that the region's top ten most productive residential developments across the region ("hot spots") accounted for 39% of all permitted new residential units in 2021. The region's top ten hot spots were located in Baltimore City and Anne Arundel, Carroll, Harford, and Howard counties, and are listed below:

- 1) Baltimore Peninsula, formerly *Port Covington* (South Baltimore) with 531 permitted units
- 2) Downtown Columbia (Columbia) with 472 permitted units
- 3) Two Rivers (Crofton) with 403 permitted units
- 4) Bristol Court Apartments (Elkridge) with 311 permitted units
- 5) 7900 Sandy Farm Rd (Jessup/Severn) with 300 permitted units
- 6) Somerset (East Baltimore) with 268 permitted units
- 7) The Edge (Aberdeen/Havre de Grace) with 237 permitted units
- 8) 5501 Eastern Ave (Canton) with 227 permitted units
- 9) Meades Crossing, Meadowbrook (Taneytown) with 168 permitted units
- 10) Watershed (Maryland City) with 153 permitted units

In the second portion of the presentation, Ms. McDermott cycled through each of the region's jurisdictions, highlighting the five most productive residential developments within each.

[Story Map: Hot Spot Report 2021- The Baltimore Metropolitan Region and <https://storymaps.arcgis.com/stories/965fcdf0961f40adb0904b2b20f4a207>]

5. NEW BUSINESS

The next CFG meeting will be held Wednesday, February 22. The meeting format will be hybrid. Members can attend the meeting virtually or in person.

Mr. Kimberly recognized that this was Mr. Bronow's last meeting as Chair of the CFG, and thanked him for his leadership. Starting with the February 2023 meeting, the Chair will be Ms. Price from Harford County, with Steve Cohoon of Queen Anne's County serving as vice chair for the next two calendar years.

The meeting adjourned at 11:33 A.M.

ATTENDANCE

Members

Krishna Akundi, Maryland Department of Planning
Austin Broderick, Baltimore County Department of Planning
Jeff Bronow, Howard County Department of Planning and Zoning
Steve Cohoon, Queen Anne's County Department of Planning and Zoning
Kathleen Comber, Carroll County Department of Planning
Jennifer Meacham, Baltimore County Department of Planning
Deborah Price, Harford County Department of Planning and Zoning
Alfred Sundara, Maryland Department of Planning
James Wilkerson, Howard County Department of Planning and Zoning

Staff and Guests

Charles Baber, BMC
Greg Goodwin, Metropolitan Washington Council of Governments
Shawn Kimberly, BMC
Crystal McDermott, BMC